

# Enter an EFT Transaction for an Invoice from a Customer Record

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If a customer has one or more credit cards or bank accounts on file, you may enter an EFT payment from the customer record. There are two methods of how to begin the entry of the EFT for an invoice; these are described as options A and B below.

## Option A

Open the Customer record, and in the Active pane under the Open Invoices area, highlight the invoice for which you want to enter the EFT payment, right-click and select the Make EFT Payment option.

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## Option B

Open the Customer record, and in the Active pane under the Open Invoices area, double-click on the invoice for which you want to enter the EFT payment.

Once the invoice is displayed, click on the EFT button located at the lower right of the invoice form.

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1. The New Transaction form will be displayed.

- From the drop-down list, select either a bank account or credit card to be used for the transaction.
- The Description field will default to "Invoice" followed by the invoice number the customer is paying. This information appears on the customer's bank or credit card statement. You may change the description if desired.
- The Process date will default to today's date. If the customer is post-dating this transaction, you may enter a future date into this field.

**Note:** If the customer wants to pay more than one invoice, check the box to the left of each invoice to be paid. You will probably want to modify the description field to indicate multiple invoices are being paid.

You may select either the Submit Now or Save button.

- When selecting the Submit Now button, this transaction will automatically be sent to Forte for funding. If this is a credit card transaction and the customer has available funds on their line of credit to cover this payment, the transaction will be saved to the Approved tab of the EFT Processing grid. Otherwise, the transaction will be declined and be saved to the Rejected tab.
- Clicking on the Save button will add this transaction to the Ready tab of the EFT Processing grid to be submitted at a later time.

**Note:** The amount field may not be modified. If the customer wants to make a partial payment for an invoice, you would need to setup the EFT as unapplied cash. Please refer to this the article [Enter an EFT Transaction for Unapplied](#)

[Cash](#) for more information.

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